

**Team Charters in Business Education:
The Importance of Perceived Level of Working Well Together**

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Abstract. Schools of business aim to help students develop employer-valued skills, which include communication, teamwork, critical thinking, and application of learning. This can be achieved through team assignments and community-based learning. Such approaches help students apply the concepts they are learning, collaborate with others, develop managerial skills, and solve real-life workplace issues. Teamwork is commonly thought to be enhanced when students establish a team charter outlining their goals, norms, and processes. Research on the value of team charters in business education, however, is limited. This study examined the role of team charters on student perceptions of working well together. Data was collected and analyzed from a mid-term team evaluation and a final team charter assessment. Findings indicated that perceived value of team charters differs across the year in school and tends to be higher for less experienced students. The provision of a structured project roadmap clarified team member roles, responsibilities, personal accountability, and team vision.

Professionally accredited schools of business are required to demonstrate that their educational programs and pedagogical practices contribute to lifelong learning and real-world impact (Association to Advance Collegiate Schools of Business, 2020). This entails helping students develop cross-cutting skills such as communication, ethical judgment, teamwork, and application of learning (Hart Research Associates, 2018). In response, business and management professors may design team assignments and community projects to provide students with opportunities to work with others, resolve issues, and view real-life problems through the lens of academic theories.

Team charters are often a precursor to team assignments to help students determine roles and processes for working together. A team charter, sometimes called a group contract, is a written contract or document that outlines a team's purpose, goals, processes, roles, and norms. Charters set expectations for team member behaviors, task management, and allocation of work (McDowell et al., 2011). They may also outline how to address performance problems and require the signature of all team members (Hunsaker et al., 2011). Benefits of this approach are improved communication, effort, team member support, unity, and contentment (Aaron et al., 2014; McDowell et al., 2011); strong team member relationships and increased task commitment (Pak & Kim, 2018); and increased motivation and sense of responsibility

(Pertegal-Felices et al., 2019). It is unknown, however, to what extent students use their charters to guide them (Hunsaker & Hunsaker, 2010), and whether they perceive charters as impacting team effectiveness, specifically the ability to work well together.

Research on team charters tends to focus on content recommendations rather than effectiveness in developing teamwork skills (Aaron et al., 2014; Bird & Luthy, 2010; Cupello, 1995; Hunsaker et al., 2011; Mathieu & Rapp, 2009; Norton & Sussman, 2009; Pilette, 2017). Research has also examined team cohesion as a result of shared expectations, or psychological rather than written contracts, which develop naturally as teams collaborate (Holtham et al., 2006; Hunsaker & Hunsaker, 2010; Hunsaker et al., 2011; Norton & Sussman, 2016; Robinson, 1996; Rousseau, 1989; Sverdrup & Schei, 2015). Psychological contracts, which evolve based on team members working together but are unwritten, may be more impactful than formal, written team charters (Johnson et al., 2022). Additionally, charter use has been shown to be effective in the forming stage of group development, in which team members get acquainted, establish parameters, and gain confidence in each other's abilities (Tuckman, 1965; Tuckman & Jensen, 1977), but with no impact on final project grades (Johnson et al., 2022).

The goal of this study was to explore the role of charters on student perceptions of working well together. Data was collected from a midterm team evaluation and an end-of-semester team charter survey. Findings contribute to teaching practice, helping business professors and those in other disciplines determine effective pedagogical approaches for developing employer-valued teamwork skills.

Literature Review

Collaborative assignments are a high impact practice (HIP) that necessitate teamwork, which is highly valued by employers (Certified Practising Accountant Australia, 2012; Hart Research Associates, 2015, 2018; Kuh, 2008; Kuh et al., 2013; Kuh et al., 2017; Rhee et al., 2013). Other skills employers seek in recent college graduates are written and oral communication, ethical decision-making, critical thinking, and the application of knowledge, all of which they consider critical to success in today's global economy, more so than preparation in a specific major (Association of American Colleges & Universities, 2019; Hart Research Associates, 2015, 2018).

Learning outcomes resulting from HIPs, primarily based on student self-reports, include essential skills such as communication and critical thinking; practical competence, defined as disciplinary knowledge, teamwork, technological, quantitative, and problem-solving skills; and personal and social development, specifically values and ethics, understanding of self and others, civic engagement, independent learning, and spirituality (Finlay & Brown McNair, 2013). These skills reflect those emphasized by employers, and many can be developed through well-managed team assignments.

Team Charters

Developing effective teamwork skills in business and management courses, as well as in higher education courses generally, however, is more complex than just creating team assignments. In other words, "good practices in teamwork are not simply learned by being part of a team" (Zarraga-Rodriguez et al., 2015, p. 275). Most students have worked in groups, defined as a "collection of individuals with a task to be

concluded without much defined structure,” but may not differentiate groups from teams (Scott et al., 2012, p. 190). Teams involve “a small number of people with complementary skills who are committed to a common purpose, set of performance goals, and approach for which they hold themselves mutually accountable” (Katzenbach & Smith, 1993, p. 2).

Students need structure and guidance to develop teamwork skills (Andrade & Ziegner, 2021). Teamwork involves collective performance, mutual goals, common working approaches, individual and mutual accountability, and diverse skill sets (Katzenbach & Smith, 1993, 2015; Robbins & Judge, 2017). Charters can clarify expectations, facilitate decision making, ensure equal contributions, and address problems that may emerge (Holtham et al., 2006; Hunsaker et al., 2011). They help students recognize the value of shared purpose; diverse perspectives, abilities, and personalities; and openness to feedback (Andrade, Miller, et al., 2020). In particular, they provide guidance for those who lack teamwork experience (Hunsaker et al., 2011; Norton & Sussman, 2016).

Content and Development

Charters typically involve asking teams to identify their goals, roles, and norms (Goodbody, 2005; Mathieu & Rapp, 2009; Moussa et al., 2017; Norton & Sussman, 2009, 2016). Goals might involve effective learning and application of class concepts. Roles ensure that each team member has a responsibility and knows how to fulfill it. Norms include expectations, meeting times, communication methods, deadlines, and conflict resolution strategies. Team charters help student teams plan and organize their work, understand their responsibilities, and be individually and collectively accountable. Ideally, all team members are involved in creating the charter, which is regularly reviewed to evaluate progress, inform goal setting, and recognize achievements (Andrade, Miller, et al., 2020). Agreement on charter content may be attested to by having students sign off on their charters (Harris & Bristow, 2016; Hunsaker et al., 2011).

To ensure quality, instructor oversight and feedback is likely needed. Content must be specific enough to guide teams and help them address issues (Aaron et al., 2014; Norton & Sussman, 2009; Pak & Kim, 2018; Pertegal-Felices et al., 2019). Setting guidelines, identifying effective teamwork principles, and providing training aids the development of quality charters (Fittipaldi et al., 2018). Learning management systems can facilitate team formation, communication, peer review, and collaboration (Loughry et al., 2014). Individual and team reflection increases accountability and helps students identify needed changes in their charters and set goals for improvement (Andrade, 2019; Andrade, Miller, et al., 2020; Andrade, Kakegawa, et al., 2020). Students should be encouraged to revisit and modify charters as needed (Andrade & Ziegner, 2021; Knapp et al., 2020).

Charter Effectiveness

Research has predominantly focused on practices for charter content and implementation. As such, a gap in the scholarship on team charters is recognized: “Despite the increasing interest in the initial phase of teamwork, the literature on team charters is surprisingly atheoretical” (Sverdrup & Schei, 2015, p. 452). However, four

concepts have been identified as having potential in gaining insight into team charter use:

1. *Social exchange theory* describes the measurement of costs and benefits associated with decisions in order to balance commitments and maximize rewards (Hunsaker et al., 2011; Wayne et al., 1997). In a similar way, team charters may help students determine their level of contribution and commitment to team assignments, specifically the amount of work they need to do in order to get the greatest reward.
2. *Realistic job previews* are designed to help job candidates anticipate their responsibilities and experience their future working environments (Norton & Sussman, 2016). Similarly, charters set out expectations for team assignments and tasks, thereby helping students understand what is involved and the roles and tasks they need to perform.
3. *Psychological contracts*, or implicit agreements that evolve naturally, may result in an informal establishment of norms as opposed to a formal, written charter (Hunsaker et al., 2011; Johnson et al., 2022; Norton & Sussman, 2016; Robinson, 1996; Rousseau, 1989). Effective psychological contracts focus on effort, quality, and tolerance as opposed to processes (Sverdrup & Schei, 2015).
4. *Planning, organizing, leading, controlling* are managerial functions (Fayol, 1916) that have been shown to be developed through teamwork (Andrade & Ziegner, 2021). Team charters guide students in establishing processes related to these functions. Specifically, a charter may help students in the forming stage of group development (Johnson et al., 2022).

Research has not typically examined the impact of team charters on student learning or outcomes. One exception is a study of global teams, half of which used a charter and half which did not (Johnson et al., 2022). Charter use did not impact output quality in the form of grades. The researchers suggest that teams in the study relied more on informal psychological contracts than formal written contracts. The preponderance of team charter research has identified ideas for content (e.g., see Aaron et al., 2014; Bird & Luthy, 2010; Cheruvelil et al., 2020; Cupello, 1995; Hunsaker et al., 2011; Kirkman et al., 2019; Norton & Sussman, 2009; Pilette, 2017; Sverdrup & Schei, 2015). Thus, additional research is needed to demonstrate the value of team charters in business education and across higher education in general.

Methods

Participants were enrolled in a required introduction to organizational behavior course at a large, regional, open admission university. Team assignments involved management challenges, requiring the application of theory to resolve managerial issues, in preparation for a community-based consulting project. Data was collected in five sections of the course taught by the same instructor over two semesters. Participants totaled 124 students. The study met all requirements for research involving human subjects and all participants signed a consent form. Instructor-created teams of approximately six students were instructed on the purpose

of team charters and provided with content guidelines prior to developing their charters.

Data collection entailed a midterm team performance survey and an end-of-semester team charter survey. The midterm survey had nine 5-point Likert-scale questions on team effectiveness and two open-ended questions based on the characteristics of high-performing teams (see Appendix A). The end-of-semester survey consisted of eight sections with questions on various aspects of team charters as reflected in the literature—use, quality and training, a living document, charter alternatives, efficacy and clarity, motivation and enjoyment, conflict, and outcomes—with several 5-point Likert-scale questions in each section. Three open-ended questions were included as well as questions on gender, age, and team leader role (see Appendix B).

Quantitative Methodology

The quantitative analysis consisted of both descriptive and inferential statistical analyses. We started by running appropriate bivariate and multivariate analyses¹ on all key study variables. Next, we ran an Ordinary Least Squares regression (OLS) model for all main study variables. The goal for this analysis was to examine the experiences of students related to developing and implementing charters and how the charters served to improve their ability to work well together on community-based learning (CBL) projects.

Qualitative Methodology

The researchers used NVivo software to analyze answers to the open-ended questions from both the midterm and end-of-semester surveys (see Appendices A and B). The class instructor did not participate in the coding of the open-ended question responses; thus, confirmation bias was not an issue. The goal for this analysis was to examine the experiences of students related to developing and implementing charters and how the charters served to improve their ability to work well together on community-based learning (CBL) projects.

High frequency data themes under the CBL operational data themes were recorded and analyzed using NVivo software. Data categories and subthemes were coded and counted within the sample of 124 completed surveys employing NVivo software. Those data themes with the highest frequencies (minimum of 3) under each of the categories and subthemes are presented in Table 2. While data frequencies are of interest, the most important value of the qualitative tradition of phenomenology is the richness that emerges through respondent comments as students describe their lived experiences related to developing and living by a student charter for a CBL project (e.g.,

¹ All correlations, cross-tabulations, ANOVA, ANCOVA, post-hoc tests, and full descriptive statistics have not been included here due to space limitations but are available upon request. Additionally, appropriate tests for multicollinearity were conducted. There are no issues with multicollinearity of variables in the OLS model. Additionally, all outliers were Winsorized in the initial data cleaning stages, prior to final models and analysis.

see Creswell, 1998). Appendix D provides a selection of memorable and representative student quotations related to this experience and a discussion follows. (Note: student quotations have not been edited.)

Results

Descriptive Results

This study examines survey responses from 124 students who use a project charter and completed a project charter survey and midterm team evaluation survey during the semester. In Table 1 on pp. 79-81, you will see survey items and means scores for all students combined and for each year of school, across four main survey item categories. We categorized sophomore students ($N=22$) as those with 30-60 completed college credits, junior students ($N=66$) as those with 60-90 college credits completed, and senior students ($N=36$) as those with more than 90 completed college credits. The four general categories of survey items include: (1) Project Charter questions, (2) Project Process questions, (3) Project Dynamics questions, and (4) Team Dynamics questions.

While we did not see many statistically significant differences when looking at mean score differences between students' academic year, below we highlight survey items of interest with statistically significant differences in mean values (organized by the four survey item categories):

- *Project Charter Questions:* Sophomore students were significantly less likely than juniors and seniors to use their project charter document throughout the semester. Ironically, they were also significantly more likely than juniors and seniors to say that having a team charter was valuable, that the project charter helped the team to clarify roles and responsibilities, and that the information included in the project charter was useful.
- *Project Processes Questions:* Sophomore students were significantly more likely than juniors and seniors to say that they knew what to do on their team assignments, while junior students were significantly more likely to say that informal rules for working together were more effective than the project charter and senior students were significantly more likely to allow their processes to evolve over the course of the semester naturally and organically.
- *Project Dynamics Questions:* Sophomore students were significantly more likely than juniors and seniors to say they had task, process, or interpersonal conflicts while completing the team projects, while senior students were statistically more likely than sophomores and juniors to say they worked well together on the team project.
- *Team Dynamic Questions:* Senior students were significantly more likely than sophomore and junior students to give each other open and direct feedback when needed.

Table 1*Mean Scores of Study Variables, by Year in School*

Variable	Sophomore	Junior	Senior	Overall
Project Charter – End of Semester Survey				
Having a team charter was valuable.	5.50	5.00	5.33	5.19
Our team charter provided direction.	5.32	5.05	5.36	5.19
Our team charter helped us address conflict.	4.55	4.74	4.81	4.73
Our team charter helped us clarify our roles and responsibilities.	5.50	5.11	5.28	5.23
Our team charter helped us make decisions.	5.00	4.62	5.11	4.83
We used our team charter throughout the semester.	3.95	4.27	4.67	4.33
We did not use our charter after we initially created it.	4.05	4.23	4.42	4.25
The process of creating the team charter was beneficial.	5.00	4.98	4.68	4.91
The information in our team charter was useful.	5.45	4.89	5.19	5.08
Our team charter had sufficient detail to guide us.	4.77	4.70	5.03	4.81
We needed more guidance on how to write a team charter.	4.18	4.14	4.50	4.25
We needed more guidance on how to use a team charter.	4.27	4.33	4.72	4.44
We reviewed our charter at midterm when we did our team reflection.	5.00	4.80	5.39	5.01
We made changes to our charter as part of our midterm team reflection.	4.36	4.27	4.97	4.49
We reviewed our team charter multiple times during the semester.	4.05	3.85	4.31	4.02
We made changes to our charter during the semester to reflect our actual practices.	4.05	3.80	4.33	4.00
Project Processes – End of Semester Survey				
Our processes for what to do and how to do it naturally evolved over the semester.	5.32	5.44	5.69	5.49

Table 1 Cont.

Variable	Sophomore	Junior	Senior	Overall
Our informal rules for working together were more effective than the team charter.	4.95	5.42	5.14	5.26
We each understood our roles and responsibilities.	5.27	5.39	5.39	5.37
We had effective processes to help us complete assignments.	5.45	5.50	5.44	5.48
We had clear goals and worked together to achieve them.	5.27	5.52	5.61	5.50
Project Processes – End of Semester Survey				
I believed in my team's ability to successfully complete assignments.	5.50	5.68	5.61	5.63
I knew what to do on assignments.	5.91	5.64	5.61	5.68
We changed our team roles during the semester (e.g., someone else took the role of leader or you switched your responsibilities related to planning, organizing, content development, design, editing, etc.)	1.50	1.53	1.61	1.55
Project Dynamics – End of Semester Survey				
I was motivated to succeed in the course.	5.86	5.71	5.97	5.81
I enjoyed working with my team members.	5.50	5.35	5.47	5.41
We worked well together.	5.59	5.39	5.86	5.56
We had conflicts over tasks, or what to do on assignments (e.g., content, design, approaches)	4.27	3.64	3.50	3.71
We had conflicts over processes, or how to do assignments (e.g., scheduling, workload, roles, decision making).	4.27	3.62	3.50	3.70
We had interpersonal conflicts (e.g., belittling team members, dismissing team members' comments, judging team members unfairly).	3.36	2.70	3.00	2.90
The ePortfolio assignments helped me learn and apply the course content.	5.41	5.18	5.31	5.26
Working with my team members helped me learn and apply the course content.	5.55	5.06	5.31	5.22

Table 1 Cont.

Variable	Sophomore	Junior	Senior	Overall
Our solutions and ideas for the ePortfolio assignments were based on theories.	5.68	5.44	5.50	5.50
We were creative in our work.	5.55	5.52	5.92	5.64
Team Dynamics – Midterm Survey				
We each understand our roles and responsibilities.	4.09	4.23	4.31	4.23
We have effective processes to help us complete assignments effectively.	4.32	4.33	4.44	4.36
We give each other open feedback when needed.	3.95	4.06	4.31	4.11
We have clear goals and work together to achieve them.	4.36	4.33	4.25	4.31
Team Dynamics – Midterm Survey				
We are willing to sacrifice personal interests for the team's goals.	3.73	3.82	3.83	3.81
We work well together.	4.23	4.33	4.47	4.35
Learning with a team helps me learn better than on my own.	3.32	3.56	3.53	3.51
Everyone on the team does his or her part.	3.91	3.68	3.97	3.81
I need more guidance from my team leader.	2.50	2.68	2.25	2.52

Regression Results

We wanted to understand student responses in relation to a key outcome variable: The Perceived Level of Working Well Together. Ordinary Least Squares (OLS) linear regression models were estimated using the survey items listed in Table 1 above in order to examine the determinants of the perceived level of working well together, both for the entire sample of all students, as well as broken down by the students' academic year. Table 2 on p. 82 shows the OLS model details for the Perceived Level of Working Well Together by year in school.

As can be seen in Table 2, OLS models for the combined model and for the three academic year models had *adjusted r-squared* values of 0.777 to 0.836, meaning each predicts approximately 78% to 84% of the variability in the outcome variable. Additionally, statistically significant independent variables were mostly consistent across the OLS models (with a few exceptions), even when broken down into smaller student academic year samples. While the robust statistical significance is impressive for the small overall sample of all students ($N=124$), these findings are even more impressive for the even smaller sample sizes when the same model was run by the

students' academic year in school, as it is very difficult to reach statistical significance with such small sample sizes.

In comparing the OLS models across the combined sample and the three smaller academic year samples, Table 2 does demonstrate some key differences. First, for sophomore students, "I enjoyed working with my team members" (positive) and "We had conflicts over processes, or how to do assignments (e.g., scheduling, workload, roles, decision making)" (negative) had the strongest standardized beta coefficients and statistical significance in predicting the perceived level of working well together. Second, for both junior and senior students, "I enjoyed working with my team members" (positive) had the strongest standardized beta coefficient and statistical significance in predicting the perceived level of working well together.

Table 2

The Perceived Level of Working Well Together, by Year in School

Variables	Beta Coefficient and Significance			
	Sophomore	Junior	Senior	Overall
We did not use our charter after we initially created it.	-0.332***	-0.078	-0.002	-0.135***
Our informal rules for working together were more effective than the team charter.	0.330***	0.116*	0.000	0.148***
I enjoyed working with my team members.	0.615****	0.825****	0.920****	0.794****
We had conflicts over tasks, or what to do on assignments (e.g., content, design, approaches)	0.2391546	0.280***	-0.161	0.238***
We had conflicts over processes, or how to do assignments (e.g., scheduling, workload, roles, decision making).	-0.495**	-0.386****	0.085	-0.351****
<i>N</i>	22	66	36	124
ADJ. R-SQUARED	0.825	0.807	0.836	0.777
<i>F</i>	20.78****	55.40****	36.78***	86.58****

Beta Values; Significance Level: * = $p < .10$, ** = $p < .05$; *** = $p < .01$; **** = $p < .001$

Qualitative Results and Discussion

The qualitative themes were derived from an analysis of responses to the two open-ended midterm survey questions (see Appendix A) and the three open-ended questions on the end-of-semester survey (see Appendix B). High frequency data themes under the CBL operational data themes were recorded and analyzed using

NVivo software. Data categories and subthemes were coded and counted within the sample of 124 completed surveys employing NVivo software. The data themes with the highest frequencies (minimum of 3) under each of the categories and subthemes are presented in Appendix C. While data frequencies are of interest, the most important value of the qualitative tradition of phenomenology is the richness that emerges through respondent comments as students describe their lived experiences related to developing and living by a student charter for a CBL project. Appendix D provides a selection of memorable and representative student quotations related to this experience. (Note: student quotations have not been edited.) Each theme is elaborated on in Appendix D.

Benefits to the Team Members

Students stated that by developing their group charters, their human skill sets and learning developed and benefited significantly during the semester as well. These human benefits included their improved understanding of the individual roles of working within a team, improved clarity in the definition of team member responsibilities, and a general improved sense of teamwork and positive motivation toward working tougher on the project.

In addition, the perceived benefits of team charters relate well to the establishment of realistic job previews, as discussed earlier (Norton & Sussman, 2016). The charters established expectations for team assignments and the specific tasks required by team members, as well as role definitions. Students stated that the charter served a very useful “public” purpose in “keeping us honest,” regarding their individual idea and work contributions in the project. The charter served to regulate and expose individual team member work ethics and facilitated equitable contributions. Students believed that by developing the charter together at the beginning of the semester, improved team communication and team cooperation resulted relative to other group projects they had worked on in other courses. One student stated, “I felt that the team charter helped give us structure to our team. It helped us know what our roles were and assign sections of assignments. However, I do also feel that we ended up doing what we all needed to help. We all worked together and contributed where was needed.”

The charter served to regulate and expose individual team member work ethics and facilitated equitable contributions.

Team Charter Weaknesses

It is noteworthy that data in this study revealed relatively fewer perceived weakness themes among students about team charter development and application as compared to perceived strengths and benefits (see Appendix C). A few student comments about charter weaknesses centered around the charters not being useful after being developed by their teams, i.e., “It was just some words we created to submit for a grade. People did the work they wanted to and the group suffered.” Additionally, another student stated, “It helped us at first, but overtime was forgotten about. Our team was dysfunctional and lacked a lot of key things that make a successful team. Overall, it did not really help us.” This last statement reveals more of a perceived

weakness of a group characterized not by lack of engagement rather than by the charter itself. In sum, data themes for negative comments about charters in this study were relatively low, less than 5%, as compared to the many students' perceived charter strengths.

What to Change/Improve in the Future

When asked what they would do differently next time relative to working as a team with a group charter, data themes revealed by students included the desire to establish group expectations earlier in the semester, improving group communication quality and frequency among group members, more rigorously enforcing assignment deadlines, changing team member roles periodically, and requiring group members to attend group meetings with their cameras turned on. Several of the data themes revealed a more personal approach toward management style in working together effectively as a team, rather than pertaining to the charter, such as, "I wish I had been better at leading and sharing responsibility. I don't feel like I was very good at delegating tasks."

Greatest Charter Strengths

Both quantitative and qualitative data in this study revealed a strongly positive attitude among students toward using student charters, especially among younger and less experienced students. Related to social exchange theory (Sverdrup & Schei, 2015), students recognized the costs and benefits associated with using the charters, realizing the benefits far exceeded the costs and were significant in better understanding the project's scope, as well as the required individual work investments toward yielding the greatest outcomes and rewards. Planning, organizing, leading, and controlling are each important managerial function mentioned in the data that were developed and fine-tuned through the use of the charters (Andrade & Ziegner, 2021).

Perceived major strengths of charters were revealed in data themes including the important role the charter played in benefiting the client project and team members such as improving the quality and frequency of communication among group members, the built-in structure of having regular group meetings where personal accountability must be evidenced, a general positive mindset and approach toward working together as a cohesive team, and helping and learning from each other. One student summarized these perceived strengths in this statement,

We learned from each other and were able to bring in a variety of ideas and thoughts during each meeting. We also developed more team working skills in the process and know how to better work in a team and what makes teamwork effective.

Team Charter Learning Outcomes

The highest frequency themes in this study's qualitative data centered around the emphasis placed on the charter serving to improve group communication. Students strongly believed that the charter had provided an important structure or rubric for them to follow in communicating with each other more frequently throughout the

semester, as well as more efficiently and focused on discussing project progress. One student explained how charters were helpful as follows:

Making sure there was a form a communication between everyone. We were consistent with our weekly meetings. We clarified what was expected of each person. It made the work much easier to handle when everyone did their fair share of the work. We also were able to get more ideas that I would not have come up with myself.

In addition to improved communication processes, students noted that the charter had enabled them to gain clarity on the importance of working together cooperatively, being flexible, learning from each other, generating a culture of mutual respect and teamwork where, “We helped each other and had fun.”

Another summary student comment related to learning outcomes follows:

We learned from each other and were able to bring in a variety of ideas and thoughts during each meeting. We also developed more team working skills in the process and know how to better work in a team and what makes teamwork effective.

This quote demonstrates that students gained appreciation for diverse perspectives and insights into effective teamwork practices. Finally, students stated that another critical success factor for successful team project and group dynamics was technology. Holding virtual meetings throughout the semester facilitated frequency and regularity of team meetings where productive work was being accomplished.

Implications

The descriptive data shows that in terms of effectiveness on team projects, seniors felt they worked well together while sophomores had more task, process, and interpersonal conflicts. Seniors were more likely to give each other open and direct feedback. These findings seem to indicate that greater levels of academic experience, and perhaps maturity and a willingness to communicate openly contributed to perceptions of effective teamwork.

Differences across the year in school were apparent related to level of working together. Across years in school, enjoyment of working with team members showed a statistically significant relationship with perceived level of working well together. For sophomores, conflict over tasks and not using the charter showed a negative relationship, while informal rules had a statistically significant positive relationship for both sophomores and juniors. As such, the study found some evidence that informal, psychological contracts that evolve naturally as team members work together may be more effective than written, formal charters (e.g., see Hunsaker et al., 2011; Johnson et al., 2022; Norton & Sussman, 2016; Robinson, 1996; Rousseau, 1989; Sverdrup & Schei, 2015). This finding clearly indicates the need for additional research to determine the efficacy of formal charters or contracts and to better understand how psychological contracts work for student teams.

These findings also indicate that students need to enjoy each other and need structure in the form of a charter or informal rules. The negative relationship between

not using the charter and perceived level of working well together was only statistically significant for sophomores. Conflict over tasks and processes for both sophomores and juniors resulted in a negative relationship with perceived level of working well together. It may be that seniors recognized the benefits of conflict, and consistent with the finding mentioned previously, were more skilled at open communication and conflict management. For juniors and seniors, charter use did not predict perceptions of working well together. Informal rules were predictive only for sophomores and task conflicts only for juniors.

The literature points to the value of charters in determining mutual expectations (McDowell et al., 2011), goals, communication methods, and tasks, roles, and norms (Goodbody, 2005; Mathieu & Rapp, 2009; Moussa et al., 2017; Norton & Sussman, 2009, 2016). Recommendations for charter content have been proposed (Aaron et al., 2014; Bird & Luthy, 2010; Cheruvilil et al., 2020; Cupello, 1995; Norton & Sussman, 2009; Pilette, 2017). Charter benefits may depend on quality (Courtright et al., 2017; Kirkman et al., 2019), and reflection and performance reviews play a role (Andrade, 2019; Andrade, Miller, et al., 2020; Andrade, Kakegawa, et al., 2020). However, limited research has established how student teams use charters or if factors other than charters contribute to perceptions of team effectiveness.

This study provides insights into variables that predict students' perceptions of levels of working well together. Some support was found that psychological contracts were adopted and effectively used (Holtham et al., 2006; Hunsaker & Hunsaker, 2010; Hunsaker et al., 2011; Norton & Sussman, 2016; Robinson, 1996; Rousseau, 1989; Sverdrup & Schei, 2015), particularly for seniors with academic experience. This study was limited in that it involved students from only one university in a single course. Future research could expand on the study using similar measures to determine the impact of team charter use on student perceptions of teamwork and the value of team charters.

This study shows that including the development and application of student charters in student group projects leads to several important benefits, strengths, and positive learning outcomes. Students' perceived benefits include the provision of a structured project roadmap that clarifies team member roles, responsibilities, personal accountability, and a clarified team vision toward the project by team members as they are working in project production. Additionally, data in this study revealed that perceived benefits to team members include improved team member communication, more cohesive teamwork, an improved sense of personal contribution, as well as rich learning outcomes. These learning outcomes include the realization of the importance of being flexible and learning from each other. Learning outcomes also included are the recognition of the importance of students learning to enjoy each other as they are working together. Perceived value here focuses on the yielding of stronger team member relationships and higher quality projects for community clients.

Conclusions and Future Directions

Limited research has been conducted on the efficacy of team charters for student teams. As such, this study contributes to the body of scholarly work in management education and to teaching and learning in higher education generally. The study informs approaches for helping students develop teamwork skills that are

highly valued by employers and applicable to all majors (Hart Research Associates, 2015, 2018).

Previous studies on team charters have not captured the nuances of the lived experiences of individuals. An important contribution of this study was gleaned from the lived experiences of students through their own words as they were challenged to develop their own team charters and then live by them for a semester. This study reflecting students' lived experiences via their own words has yielded a rich quality of knowledge that likely could not have been attained through a quantitative survey instrument alone.

The study demonstrated that the perceived value of team charters differs across year in school and tends to be higher for less experienced students. Thus, the importance of the charter being well developed with sufficient detail is critically important for less experienced and younger students. As students gain greater levels of education, experience, and maturity, the value of team charters decreases. Upper-level students who have worked on more team projects in previous years tend to have grown to eventually feel more comfortable communicating openly with others without restrictive charter rules to follow.

Future research should more closely investigate variables that predict students' perceptions of the value of team charters and students' perceptions of what it takes to work cohesively together with teammates on large scale semester-long projects. This study strongly suggests that the perceived value of charter content and specificity varies significantly across years of student experience and maturity. Thus, future research should focus on both human and teamwork skills and characteristics as well as the content and detail level contained within the charters themselves. Also, although this study focused on students in an organizational behavior course, findings may vary for students in other majors. As such, the study should also be expanded to courses in other disciplines. Some disciplines may place greater emphasis on teamwork than others although this is an employer-valued skill across sectors (e.g., see Hart Research Associates, 2015).

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Appendices

Appendix A

Midterm Team Evaluation Survey

Indicate your level of agreement with each of the following statements.

5-point Likert scale: strongly disagree, somewhat disagree, neither disagree nor agree, somewhat agree, strongly agree

- We each understand our roles and responsibilities.
- We have effective processes to help us complete assignments effectively.
- We give each other open feedback when needed.
- We have clear goals and work together to achieve them.
- We are willing to sacrifice personal interests for the team's goals.
- We work well together.
- Learning with a team helps me learn better than on my own.
- Everyone on the team does his or her part.
- I need more guidance from my team leader.

Open-Ended

What is working well for your team? Name 3 things.

What do you think your team needs to improve? Suggest 2 or 3 things.

Appendix B
End of Semester Team Charter Survey

Indicate your level of agreement with each of the following statements.
5-point Likert scale: strongly disagree, somewhat disagree, neither disagree nor agree, somewhat agree, strongly agree

Use

Having a team charter was valuable.
Our team charter provided direction.
Our team charter helped us address conflict.
Our team charter helped us clarify our roles and responsibilities.
Our team charter helped us make decisions.
We used our team charter throughout the semester.
We did not use our charter after we initially created it.
The process of creating the team charter was beneficial.

Quality & Training

The information in our team charter was useful.
Our team charter had sufficient detail to guide us.
We needed more guidance on how to write a team charter.
We needed more guidance on how to use a team charter.

A Living Document

We reviewed our charter at midterm when we did our team reflection.
We made changes to our charter as part of our midterm team reflection.
We reviewed our team charter multiple times during the semester.
We made changes to our charter during the semester to reflect our actual practices.

Charter Alternatives

We would have been just as effective without a charter.
Our processes for what to do and how to do it naturally evolved over the semester.
Our informal rules for working together were more effective than the team charter.

Efficacy & Clarity

We each understood our roles and responsibilities.
We had effective processes to help us complete assignments.
We had clear goals and worked together to achieve them.
I believed in my team's ability to successfully complete assignments.
I knew what to do on assignments.

Motivation/Enjoyment

I was motivated to succeed in the course.
I enjoyed working with my team members.
We worked well together.

Conflict

We had conflicts over tasks, or what to do on assignments (e.g., content, design, approaches)

We had conflicts over processes, or how to do assignments (e.g., scheduling, workload, roles, decision making).

We had interpersonal conflicts (e.g., belittling team members, dismissing team members' comments, judging team members unfairly).

Outcomes

The ePortfolio assignments helped me learn and apply the course content.

Working with my team members helped me learn and apply the course content.

Our solutions and ideas were based on theories.

We were creative in our work.

Open-Ended

What helped you the most in working together as a team?

What role did the team charter have in your teamwork?

What do you wish you had done differently as a team or as an individual?

Gender

Age

I was the team leader. Yes/No.

**Appendix C
Data Coding**

Data Category	Data Subthemes & Number of Responses
Team Charter Benefits	Benefits to the Team Helped to develop/identify team member roles 43 Defined team member responsibilities 42 Provided teamwork norms/accountability 63 Improved individual and team motivation 32 Ensured equitable participation/ contribution 57 Improved sense of individual contribution 48 Improved team communication 77 Improved team cooperation 5
Team Charter Weaknesses	Scheduling conflicts among team members 5
What to Change/Improve in the Future	Establish expectations earlier 8 Change team member roles periodically 5 Require meeting preparation of content 13 Designate an editor for each project component submission 8 Adhere to deadlines 9 Improve communication quality and frequency among team members 16 Require members to attend meetings with video on 3
Greatest Charter Strengths	Each member's individual strengths applied 58 Regular meetings 54 High member accountability 58 Effective communication 79 Team mindset/cohesiveness 59 Helping and learning from each other 48
Team Charter Learning Outcomes	Importance of regular communication and meetings 88 Importance of working together cooperatively 66 Importance of being flexible 34 Learning from each other 32 Technology is a critical success factor 15 Charter facilitated mutual respect and teamwork 61

Appendix D

Data Category & Subtheme Coding	Memorable Responses
<p>Team Charter Benefits</p> <p>Helped to develop/identify team member roles</p> <p>Defined team member responsibilities</p> <p>Provided teamwork norms/accountability:</p> <p>Improved individual and team motivation</p> <p>Ensured equitable participation/contribution</p> <p>Improved sense of individual contribution</p> <p>Improved team communication</p> <p>Improved team cooperation</p>	<p>“The team charter gave us a map of how we did our teamwork throughout the semester. We used it to identify roles and how we wanted to present the information in our blog.”</p> <p>“The team charter outlined the roles of each of our team members and helped us to know what our goals were this semester and how we were going to accomplish those goals.”</p> <p>“It set the norms for what we would do throughout the semester...”</p> <p>“It made us accountable.”</p> <p>“We were able to establish at the beginning of the semester that we wanted to have equal participation on the portfolio. I think that it was very beneficial for us to have that standard set for our team.”</p> <p>“It kept us honest”</p> <p>“Possibly the biggest help was that most of the members of the team were motivated and committed to working together and doing a good job on assignments.”</p> <p>“I think it played a role because everyone knew their responsibilities and what they needed to do to contribute to the team.”</p> <p>“We all felt like we had something to contribute to the team.”</p> <p>“We were each able to contribute different ideas and solutions.”</p> <p>“It also helped us to learn how we would like to communicate with each other and what we could do if our current communication method wasn't working.”</p> <p>“I learned how to communicate better.”</p> <p>“It helped team members to participate equally.”</p>

	<p>"I felt that the team charter helped give us structure to our team. It helped us know what our roles were and assign sections of assignments. However, I do also feel that we ended up doing what we all needed to help. We all worked together and contributed where was needed."</p> <p>"It helped us better make decisions and delegate team roles to each team member."</p> <p>"I think it was really helpful to have a variety of skills, I think we did a really good job at utilizing them and divvying up the work so nobody felt like they had to do it all on their own."</p>
<p>Team Charter Weaknesses Helpful at first, but soon became forgotten</p> <p>Scheduling conflicts among team members</p>	<p>"I think it was good for setting expectations early on, but we didn't really look at it after we created it. That said, the expectations we set remained throughout the semester."</p> <p>"We made it at the beginning and didn't really mention it again."</p> <p>"It helped up at first, but overtime was forgotten about. Our team was dysfunctional and lacked a lot of key things that make a successful team. Overall, it did not really help us."</p> <p>"It was just some words we created to submit for a grade. People did the work they wanted to and the group suffered."</p> <p>"I wish I had a better team. I wish the members of my team didn't have conflicting schedules preventing us from discussions."</p> <p>"I wish we could have had a little bit better of scheduling, it was extremely difficult to meet together for assignments, but we were able to meet in smaller groups and coordinate with each other."</p>
<p>Greatest Charter Strengths Each member's individual strengths applied</p> <p>Regular meetings</p> <p>High member accountability</p> <p>Effective communication</p>	<p>"Having a team charter or at least having the experience of writing a team charter with the rest of the group was really helpful to form and work as a team. The weekly team meetings we held were really important as well. We were able to speak to each other all at once in real-time without</p>

<p>Team mindset/cohesiveness</p> <p>Helping and learning from each other</p>	<p>the distance of a text message or email that is easy to ignore or save for later to reply. Possibly the biggest help was that most of the members of the team were motivated and committed to working together and doing a good job on assignments.”</p> <p>“We each were able to contribute different ideas and solutions.”</p> <p>“Having weekly meetings that happened at the same time.”</p> <p>“Effective and frequent communication, delegating tasks equally, camaraderie and trust.”</p> <p>“People being flexible when “life” happens.”</p> <p>“Communication, Openness...Being willing to help others in tough situation.”</p> <p>“We all agreed to be willing to do the work. We made ourselves available to work together and then pick up anything that got dropped. We were fairly good at communicating and keeping each other in the loop through a group text we had set up.”</p> <p>“It was able to guide us and let us know what each of our responsibilities were as individuals and as a team.”</p> <p>“We learned from each other and were able to bring in a variety of ideas and thoughts during each meeting. We also developed more team working skills in the process and know how to better work in a team and what makes teamwork effective.”</p> <p>“I really liked how well we got together as a team. Our whole team was able to work hard and work way good as a team. We all took the responsibility to come up with what needed done and split it among who was on our team.”</p>
<p>Team Charter Learning Outcomes</p> <p>Importance of regular communication and meetings</p>	<p>“Making sure there was a form a communication between everyone. We were consistent with our weekly meetings. We clarified what was expected of each</p>

<p>Importance of working together cooperatively</p> <p>Importance of being flexible</p> <p>Learning from each other</p> <p>Technology is a critical success factor</p> <p>Charter facilitated mutual respect and teamwork</p>	<p>person. It made the work much easier to handle when everyone did their fair share of the work. We also were able to get more ideas that I would not have come up with myself."</p> <p>"Being open to picking up other's tasks during hard times, and vice versa."</p> <p>"Take advantage of technology. It is your friend in this day and age."</p> <p>"The commitment from everyone. We helped each other understand the purpose and how to accomplish assignments."</p> <p>"Clear communication channels that are consistent. Don't be inflexible with how and when you will work on your designated assignments. All viewpoints and ways of tackling a project are valid."</p> <p>"Offer unsolicited help. Do your part then turn back around and help the next team member."</p> <p>"A team full of hard-working dedicated teammates. Everyone was on the same page."</p> <p>"Building friendships with the group.</p> <p>"I was better able to understand the concept because I got different perspectives and opinions on the theories in the eBook."</p> <p>"Being open to finding a better way to do the work, working with others only creates better outcomes."</p> <p>"We helped each other and had fun working together."</p> <p>"We learned from each other and were able to bring in a variety of ideas and thoughts during each meeting. We also developed more team working skills in the process and know how to better work in a team and what makes teamwork effective."</p>
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“Documenting student learning and the conditions that promote high levels of student performance is a daunting task. Knowing how to harness evidence of student learning to improve teaching and learning and propel students to greater accomplishment is ultimately what matters.” (p. x)

*Kuh, G. D., Ikenberry, S. O., Jankowski, N. A., Cain, T. R., Ewell, P. T., Hutchings, P., & Kinzie, J. (2015). *Using evidence of student learning to improve higher education* (1st ed.). Jossey-Bass.*